

LETTER OF UNDERSTANDING BETWEEN OFNHP AND KAISER  
FOUNDATION HEALTH PLAN REGARDING SCHEDULING TEMPLATES  
IN THE OUTPATIENT PHYSICAL AND OCCUPATIONAL THERAPY  
DEPARTMENTS

FEBRUARY 2018

BACKGROUND

Kaiser Foundation Health Plan of the Northwest ("Employer" or "KPNW") and Oregon Federation of Nurses and Health Professionals (OFNHP) (collectively, "the parties") are parties to a collective bargaining agreement ("CBA") for the Professional Bargaining Unit, which covers the schedule templates of Physical and Occupational Therapists in Appendix B.2. An April 2015 LOU replaced Appendix B.2; this LOU replaces the April 2015 LOU in full, in order to improve member access and appointment utilization and better meet the needs of our members, the outpatient Physical and Occupational Therapy department, and staff.

This LOU is non-precedent setting.

This LOU shall be effective upon full execution. The Union and the Employer will have in-person meetings on a quarterly basis to assess departmental scheduling beginning at 90 days post-implementation. Meetings will occur twice yearly after the first year. Changes may be made to this Agreement following such meetings by mutual agreement in writing. This Agreement will remain in force until September 30, 2020, after which either party may withdraw by providing 90 days of notice to the other. The Agreement would remain in effect during any subsequent negotiations.

1) GENERAL SCHEDULING GUIDELINES

- Schedules for 1.0 FTE therapists will include 300 minutes of Callback Time (CBT) per week; 8-hour specialty schedules and mixed schedules may have slightly less (see sections 4 and 6 below).
- Evaluations of any appointment type will count towards the maximum news scheduled per week.
- CBT will be spread evenly through the week. Its placement on schedule will be determined by therapist and manager agreement, with attention to clinic schedule smoothing across the days and the week.
- All session limits and CBT will be prorated based on Therapist's FTE. In a given week, the total amount of time scheduled as 1:1 patient care will be used as the basis for a proration of weekly and daily evaluation session limit during that week.
- Depending on individual therapist's scheduling needs, a schedule may include more private visits and telephone visits than standard, subject to manager's approval.

2) 1.0 FTE 8-hour orthopedic schedules will include the following:

- 300 minutes of CBT per week
- Standard visit lengths of 40 minutes

- A maximum of 20 scheduled news per week
- A maximum of 4 scheduled news per day
- A maximum of 3 scheduled news in the am and a maximum of 3 scheduled news in pm
- A daily return maximum equal to the total number of slots per day less two.
- One "open 40" slot per week will become a 30 minute private plus 10 minutes of CBT. These slots will convert to an open 40 at 48 hours. The placement on the schedule of the private slot and 10 minutes of CBT will be determined by the Therapist and manager agreement, with attention to clinic schedule smoothing across the days and the week.

3) 1.0 FTE 10-hour orthopedic schedules will include the following:

- 300 minutes of CBT per week
- Standard visit lengths of 40 minutes
- A maximum of 20 scheduled news per week
- A maximum of 5 scheduled news per day
- A therapist will either have 3 maximum scheduled news in the a.m. and 4 maximum scheduled news in the p.m. *or* a therapist will have 4 maximum scheduled news in the a.m. and 3 maximum scheduled news in the p.m.. The therapist will decide whether am or pm slot will have a maximum of 4.
- A daily return maximum equal to the total number of slots per day less three.
- Two "open 40" slots per week will become a 30-minute private and 10 minutes of CBT. Alternatively, one "open 40" slot per week will become a 20-minute phone appointment and a 20-minute CBT slot. These slots will convert to an open 40-minute appointment slot if unfilled 48 hours before the appointment time. The location of the slot(s) will be determined by therapist and manager agreement, with attention to clinic schedule smoothing across the days and the week.

4) 1.0 FTE 8-hour specialty schedules will include:

- 290 minutes of CBT per week
- Standard visit lengths of 60 minutes
- A maximum of 12 scheduled news per week
- A maximum of 3 scheduled news per day
- On two days per week, the daily return maximum shall be equal to the total number of slots per day less one; on three days per week, the daily return maximum shall be equal to the total number of slots less two. The base 8-hour schedule will be built with 8 phones per week. Alternative schedules may include:
  - i) 1 private 40-minute slot and 20 minutes of CBT. Will convert to an open 60 if unused 48 hours from time of appointment.
  - ii) 1 video 40-minute slot and 20 minutes of CBT. Will convert to an open 60 if unused 48 hours from time of appointment.

5) 1.0 FTE 10-hour specialty schedules will include:

- 300 minutes CBT per week

- Standard visit lengths of 60 minutes
- A maximum of 12 scheduled news per week
- A maximum of 3 scheduled news per day
- On three days per week, the daily return maximum shall be equal to the total number of slots per day less two; on one day per week, the daily return maximum shall be equal to the total number of slots less three.

6) 1.0 FTE 8- and 10-hour mixed schedules will include:

- Session limits for scheduled news will be as close as possible to 42% of visits.
- Standard visit lengths of 40 and 60 minutes.
- Schedules with as close as possible to 300 minutes of CBT.
- Mixed schedules will vary depending on individual schedule, therapist and manager will work together.


7) Guidelines for overriding evaluation session limits

- Overriding evaluation session limits may only on the same day of service or on the next day of service.
- The waitlist will be used first to fill the slot with returns, as PAS workflow allows.
  - i) Overrides of evaluation session limits schedule may occur using the following algorithm:
    - (1) 1 open slot: may be overridden with therapist's approval
    - (2) 2 open slot: one slot converts to a new, one converts to CBT
    - (3) 3 open slots: 2 slots convert to news, one converts CBT
    - (4) 4+ open slots: manager and therapist will work together to resolve
    - (5) If there are overrides, whenever possible the last open slot will be converted to CBT.

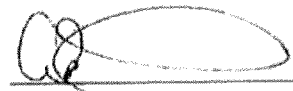
8) ADDITIONAL AGREEMENTS:

- Therapists will have 15 min of setup and 15 min of take down for each class period. Necessary travel time will be built into schedule. Any travel time between clinics for work purposes will comply with the regional travel and mileage policy.
- Therapists and management at each clinic will work in partnership to address CBT for groups based on clinic needs.
- Pediatric Developmental and Sensory Integration schedules will be bargained during the first 90 days of this agreement going into effect.
- For OT hand post ops: 2 back-to-back open 40 slots will be combined to create one post-op appointment of 80 minutes in length. This appointment will auto-convert to 2 open-40s if unfilled 48 hours before the time of the appointment.


- Therapists schedules may begin as early as 7 a.m., and extend as late as 7 p.m. based on clinic availability and therapist and management approval.
- For a non-exhaustive list of examples of schedules that comport with the agreements memorialized in this Letter of Understanding, see attached appendix.

  
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Kevi Ames  
Department Administrator  
Regional Physical, Occupational, and Speech Therapy  
Kaiser Foundation Health Plan

3/21/18  
Date

  
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Adrienne Enghouse  
President  
OFNHP

3.13.18  
Date

  
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Alison Asarnow  
Sr. Employee & Labor Relations Consultant  
Kaiser Foundation Health Plan

3/28/18  
Date